

OMB PACKAGE REQUIREMENTS

Listed below is the information that must be included in the clearance materials sent to OMB:

Background

- Describe what led up to the need for this data collection effort

Methodology

- Identify/describe the population from whom the data will be collected
- Identify/describe the sample and how it will be selected
- Identify who will collect the data
- Describe how the data will be collected
- When will the data collection begin and end

Evaluation

- Who will evaluate the data
- What statistical analyses (if any) will be employed
- What will be done with the results (i.e., how do you plan to use the data)

Data Collection Instruments

- For surveys: attach a copy of the proposed questionnaire
- For focus group interviews: attach a copy of the "screening instrument" and a copy of the "moderator's guide"

Tallies and other Information required within 60-days after the data collection is complete (Note: this information must be sent to Ross Saberlin, M:O, Office of Program Evaluation and Risk Analysis, Internal Revenue Service, 1111 Constitution Ave., NW, Washington, DC 20224:

- Findings: provide a "brief" summary of significant (important) findings that were evidenced in the results
- Actions Taken or Lessons Learned: provide a "brief" summary of any actions taken or lessons learned as a result of the findings
- Taxpayer Participation:

a. For Surveys:

1. Number of requests for taxpayer participation
2. Number of questionnaires returned or interviews completed

b. For Focus Groups:

1. Number who received screener questionnaire
2. Number who were invited to participate in the focus group interviews
3. Number who actually participated in the focus group interviews

- Date the Data Collection Began
- Date the Data Collection Ended
- Estimated Cost--Including:
 1. all vendor costs
 2. any IRS costs for travel, printing, postage, and overtime payments (but not regular salary payments)